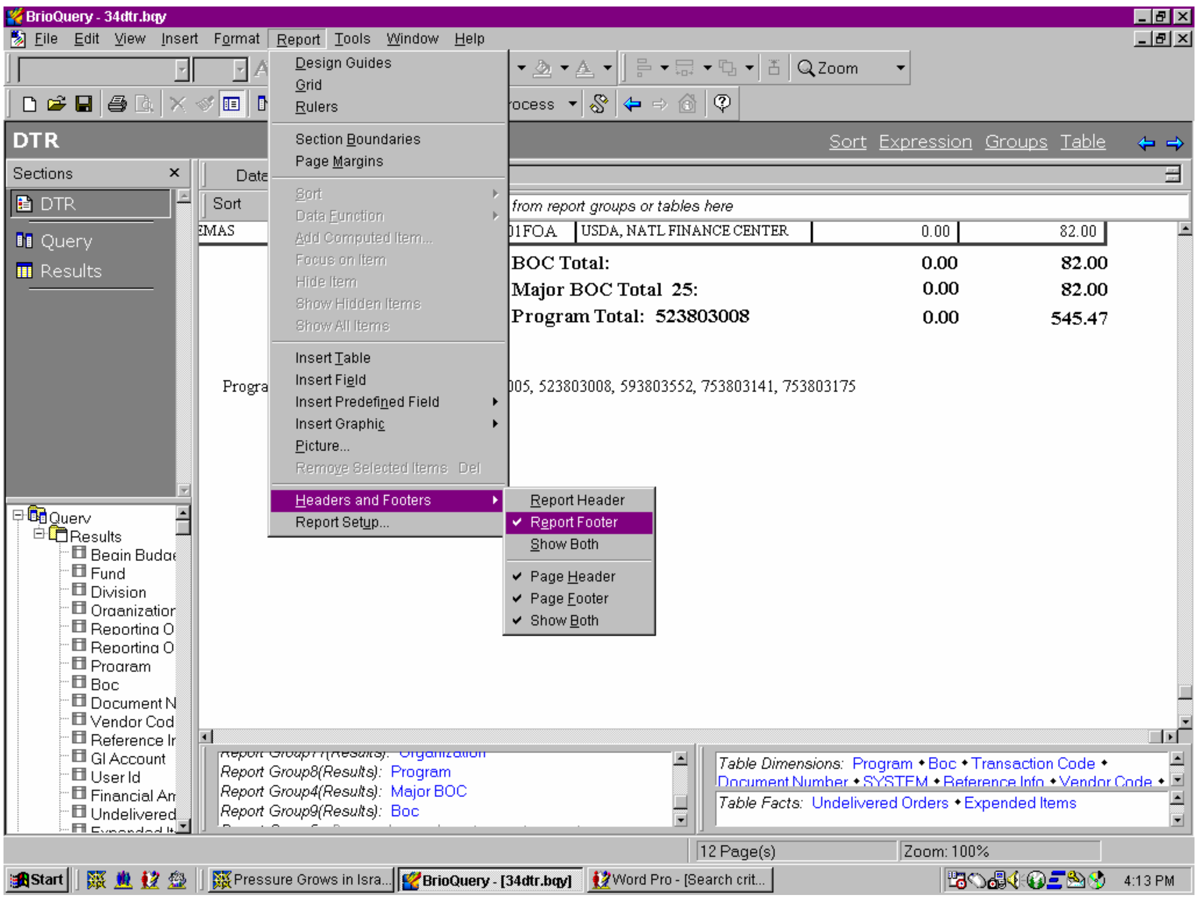
# How to put search criteria in a report

- Each report needs to state the search criteria used to pull the report. It is recorded at the end of the report. It doesn't matter if the report was made for your own use or one that will be used by the agency. The lack of search criteria will hinder a user's ability to verify what the report data is and create research problems.

**Step 1:** Open a report that has already been run. Adding Search Criteria is something you will do before you start formatting the report and after you have entered your data elements.

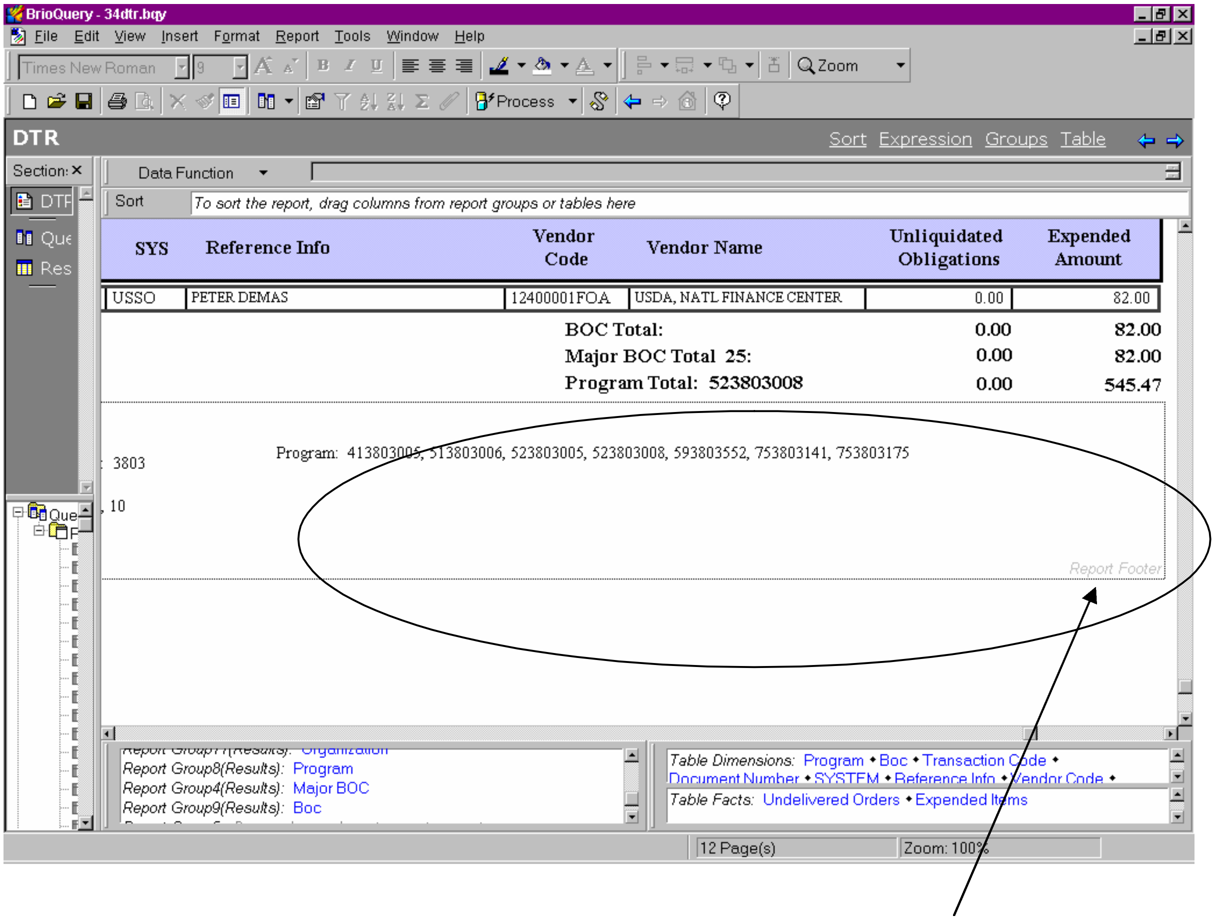
## Step 2:




2. On the Pull down menus, go to Report, then Headers and Footers, <click> on Report Footer.

Note: The difference between Report Footer and Page footer is that a Report Footer will only show up on the last page of the report while a Page Footer will be at the bottom of every single page. In this case you only need the information to show up once at the end of the report.

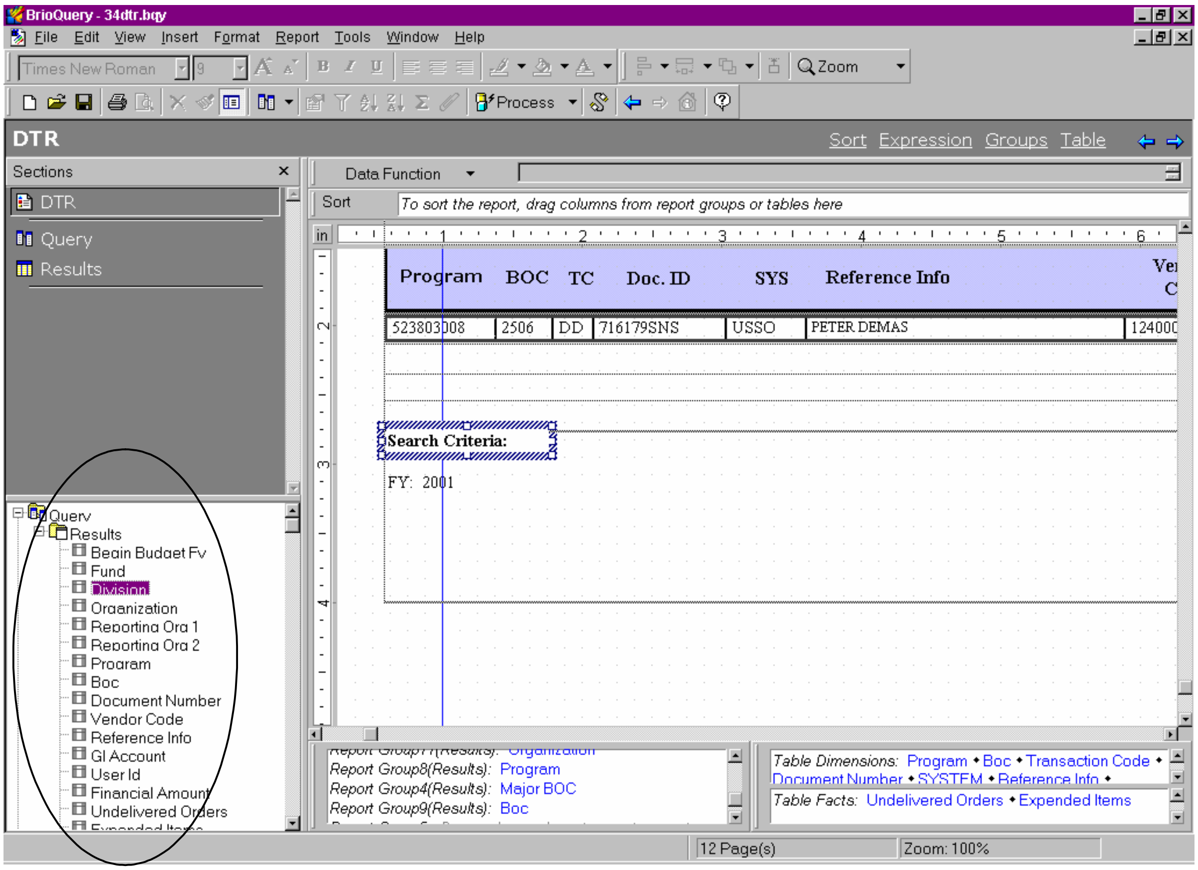
# Step 3:




3. Scroll down to the report bottom. <**click**> around until the **Report footer** section appears which is a lightly dotted box with report footer written in the lower right hand corner.

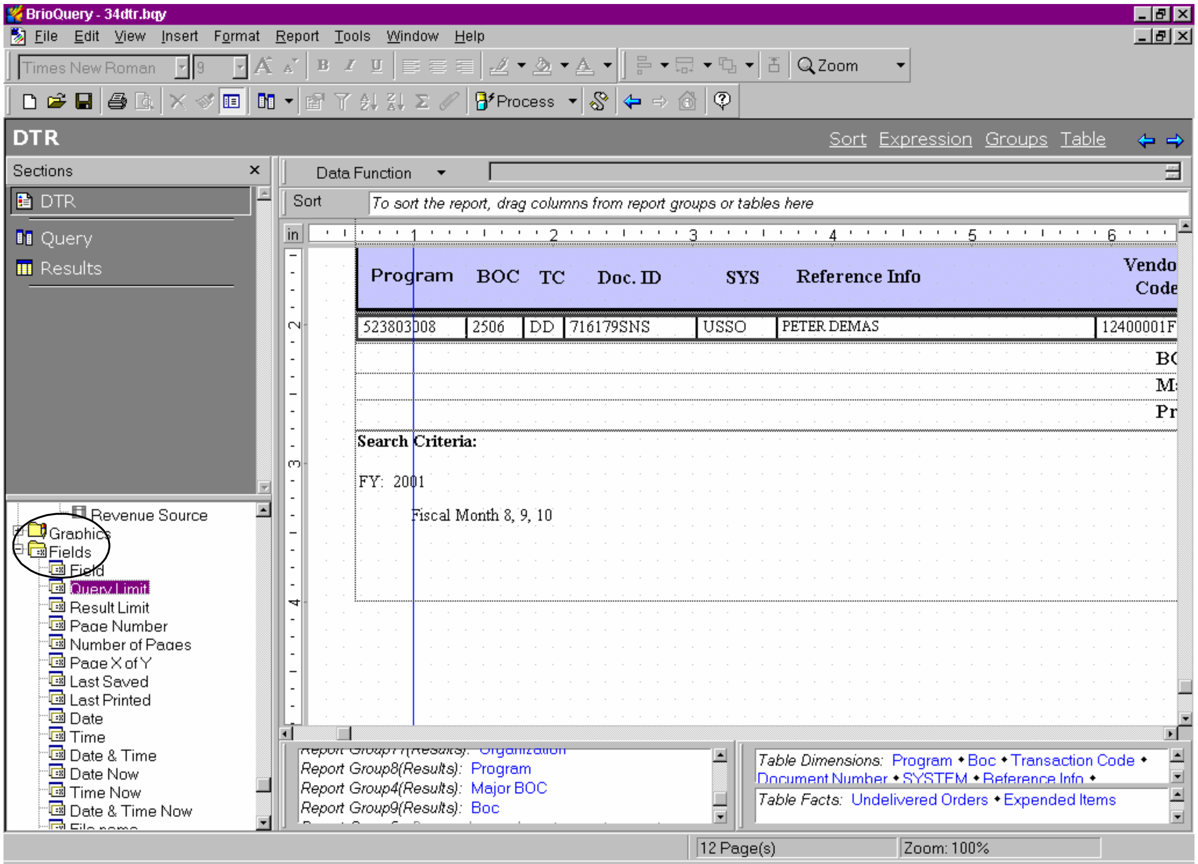
You can also set up the report to show you section boundaries continuously. Go to **Report** and <**click**> on **Section Boundaries**. This is very useful to have on when you're a designing a report just remember to turn it off when you want to send the report to someone else.

## Step 4:



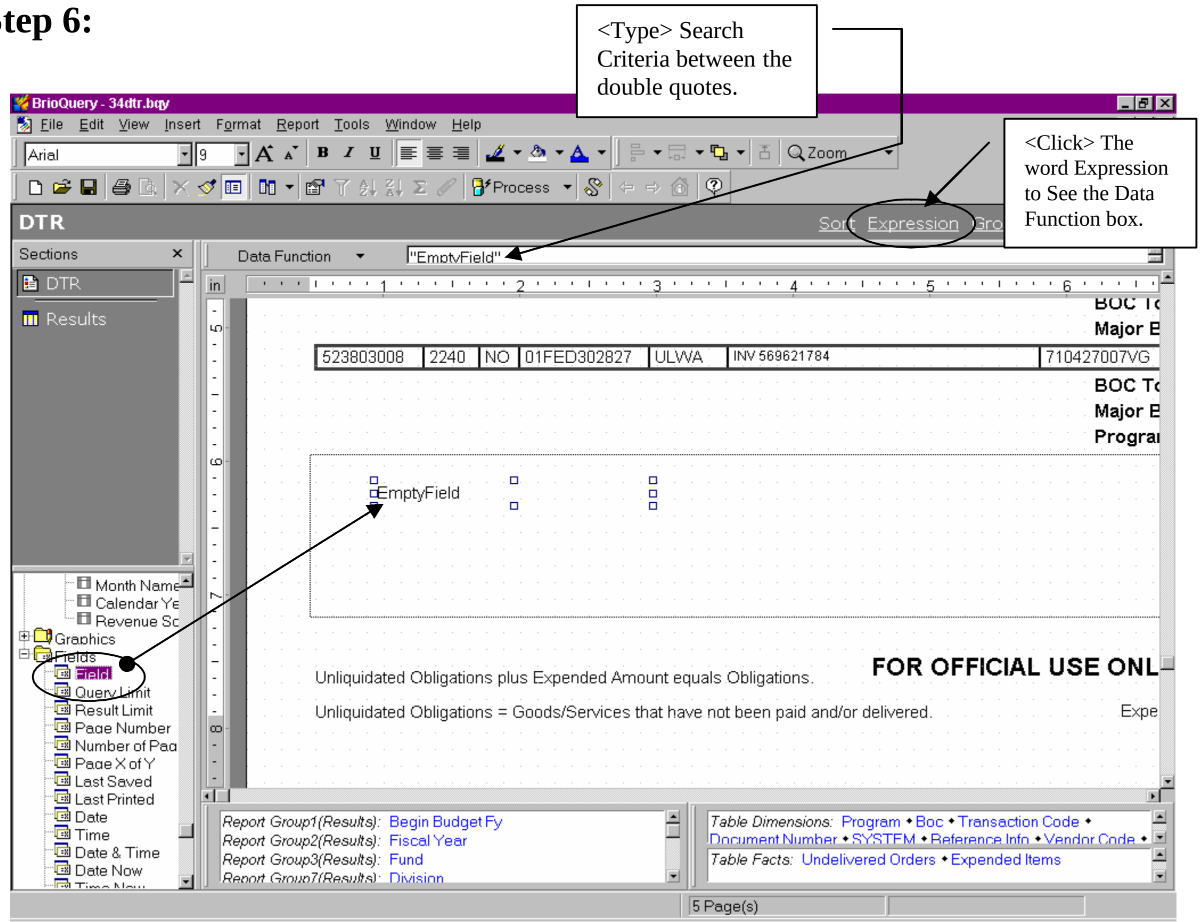

4. You should be able to view the section/category box which is located in the lower left hand corner of your screen. If this is not activated go to View and Section/Catalog. You should now see a description tree with Query, Results with all the results listed in the order placed by you in the query section.

# Step 5:




5. Scroll down to the Section/Category until you see the Fields section and <**click**> on the box with the +, you should now see a list of fields beginning with field. This is the section we will use to make our search criteria. You will also use it to do other formatting such as adding the date, time, totals, subtotals, page numbers, etc..

## Step 6:



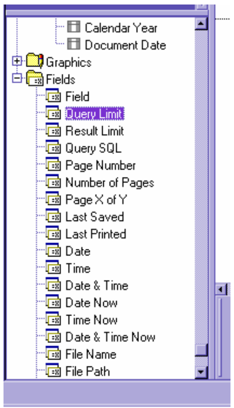

6. <**Click**> and drag the Field option into the Report Footer section of your report. You will then have a box that says Empty/Field. If you double click on that field you will only get the properties which allow you to change the font, size, number and alignment. In the middle bar below your process button is a section with the words Sort, Expression, Groups, and Table, these are toggle buttons which will bring up different selection criteria.

<**Click**> the word **Expression**. Underneath this bar and above the actual report will be a line called **Data Function** which will have the word **"EmptyField".** In between the parenthesis type in **Search Criteria:** and then <click> on the **green check mark.**

**Note: Whenever you want words to show up in a data field. You must use parenthesis and don't forget putting in spaces after the word, otherwise you will have words and data running together such as Fund:52,54.**

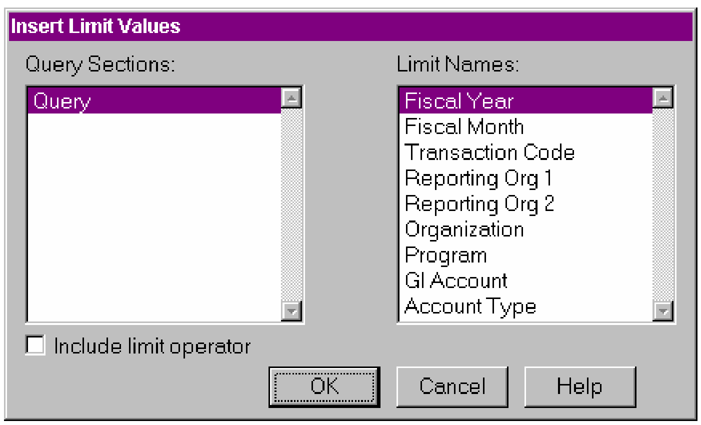
## Step 7:

a)




7. a) Double <**Click**> on query which is below Field in the Section/Category section.

b)



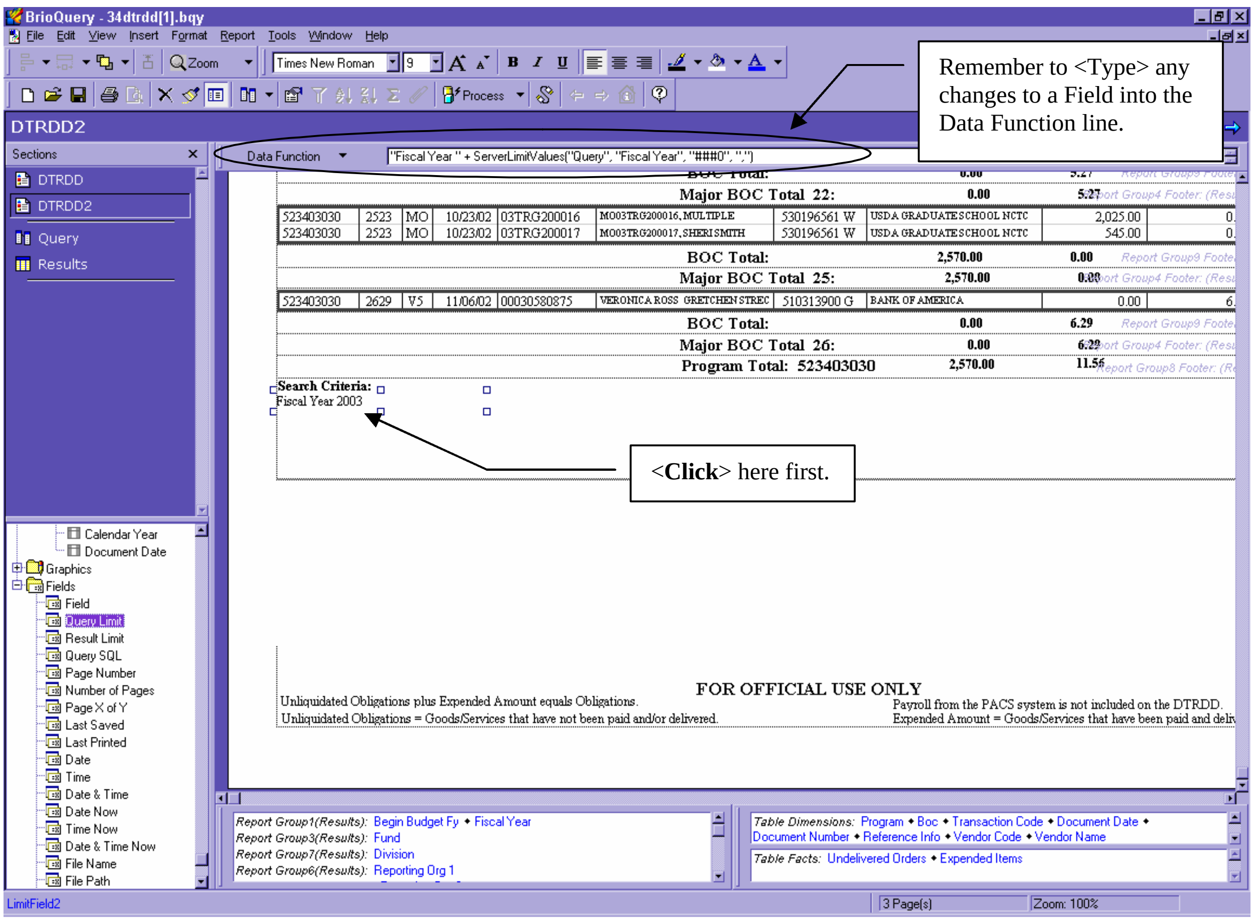

7. b) A box with the limit Names will appear <**click**> on **Fiscal Year** and then <**click**> **OK**.

Insert the other requirements in the same manner, keeping in mind that the titles can be changed for better clarification for the end users:

- Fiscal Year
- Fiscal Month ( Must use the one from Query)
- Reporting Org 1
- Reporting Org 2
- Organization
- Program
- BOC
- Division
- Fund

**Note:** To put in criteria not in the Query Limits for example **Fund**, you should scroll to the top of the Section/Category under Query, then Results. Under the Results are all the data elements that you pulled into the results section. <**Click**> and <**drag**> **Fund** into Report Footer. You will have to add the name by <**clicking**> into the **Data Function** section before the formula. The Formula is Tables("Results").Columns("Fund").Sum(currBreak). You will <**type**> **"Fund: " +** (or open quotes, Fund, colon, space, close quotes, space, plus sign, space) . Make sure to put a space after the plus and then <**click**> on the green check mark. Your whole formula will look like this: "Fund: " + Tables("Results").Columns("Fund").Sum(currBreak)

## Step 8:




8. To make it easier to read, insert a colon after Fiscal Year. To do this <**click**> on the **Fiscal Year** box in the Report Footer. Go to the Data Function Section and after Fiscal Year, and before the last parenthesis <**type**> in a colon and a two spaces and <**click**> on the green check mark.